



Consultant Checklist

We have developed this checklist to be used as a reference prior to sending procurement packets to this Agency. Please use them as a guide to assist you with the documents required for consultants. This checklist can be used for new hires as well as rehires.

1

General Information:

Board -
Date Received -
Consultant -

2

✓ Checklist:

Please ensure you
have all required
documentation listed
to the right prior
to submitting your
procurement package
to PERAC.

1. Vendor Contact Information Form
2. Retirement Board Procurement Compliance Certification
3. Vendor Certification
4. Vendor Disclosures Form
5. Placement Agent Statement
(Please include all attachments)
6. Retirement Board Evaluation Materials
7. Retirement Board Member Certification Form
(One form for each board member)

3

This procurement package is for a (check one)

☐ New Hire

☐ Rehire